



# Workday 38 System Update

Feature Highlights | March 2022

# Agenda

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- Workday Update Methodology
- Feature Highlights
- Communications and Training
- Stay Tuned

# Workday 38: Methodology

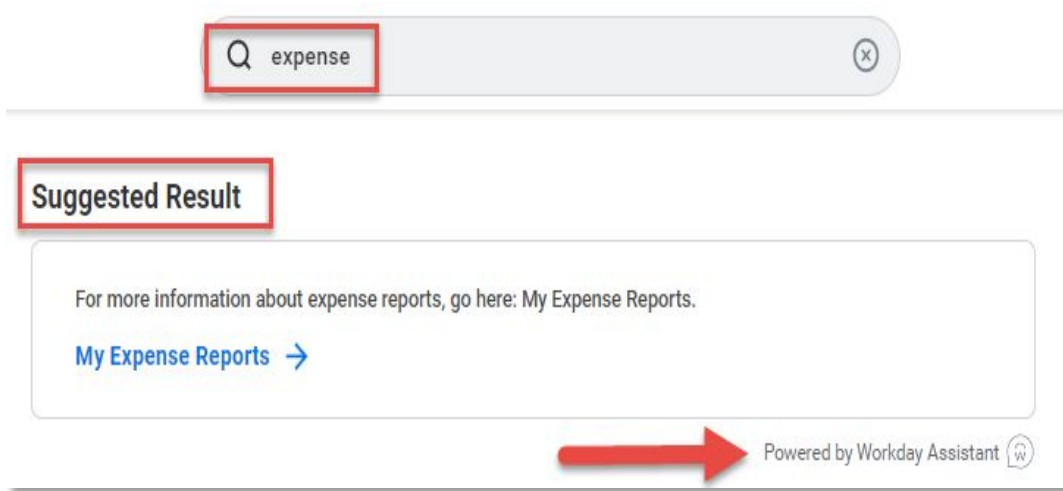
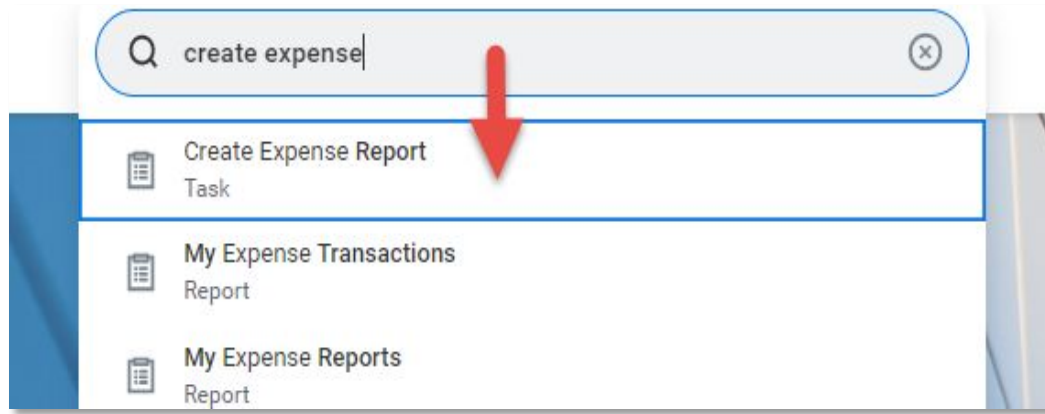
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- Workday updates functionality 2 times per year
- Each update contains many enhancements to WD functionality that Brown may accept or defer depending on their impact to the community
- Each accepted enhancement is tested prior to being deployed
- Deployment will take place over a weekend update, during which Workday will be unavailable
- The community will be provided with updated information, training and materials depending on the magnitude of the enhancement

# Workday 38: Feature Highlights

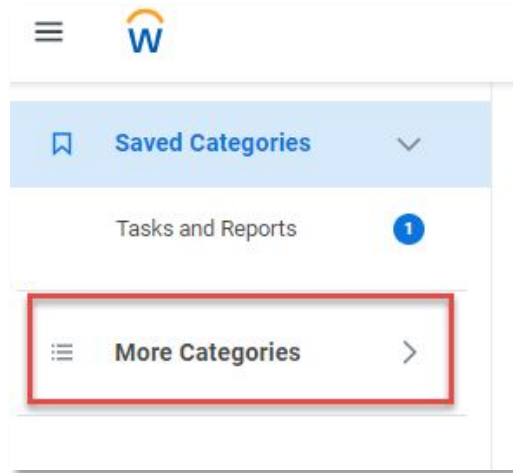
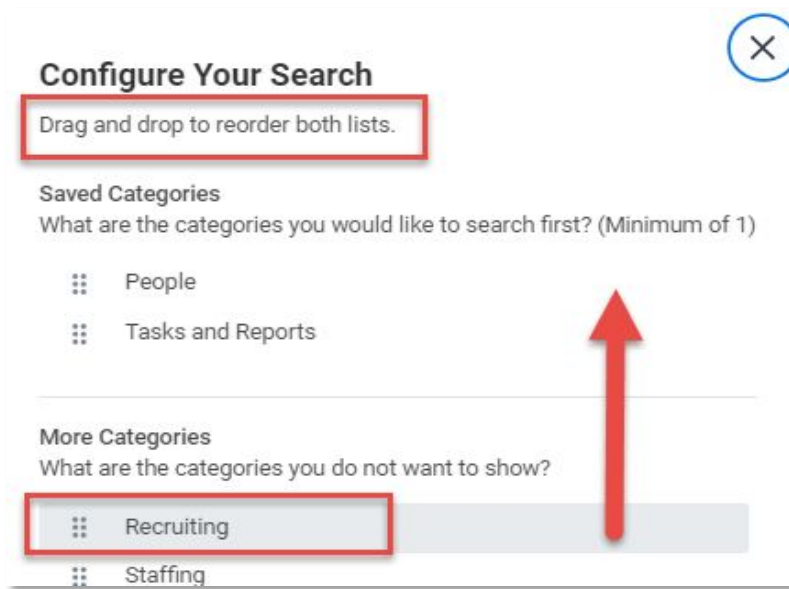
## *User Experience Changes*

- Search navigation
- Accessing and Managing Applications
- Pop Ups for tasks
- Workday Assistant updates
- Business process grid
- Change Benefits user interface



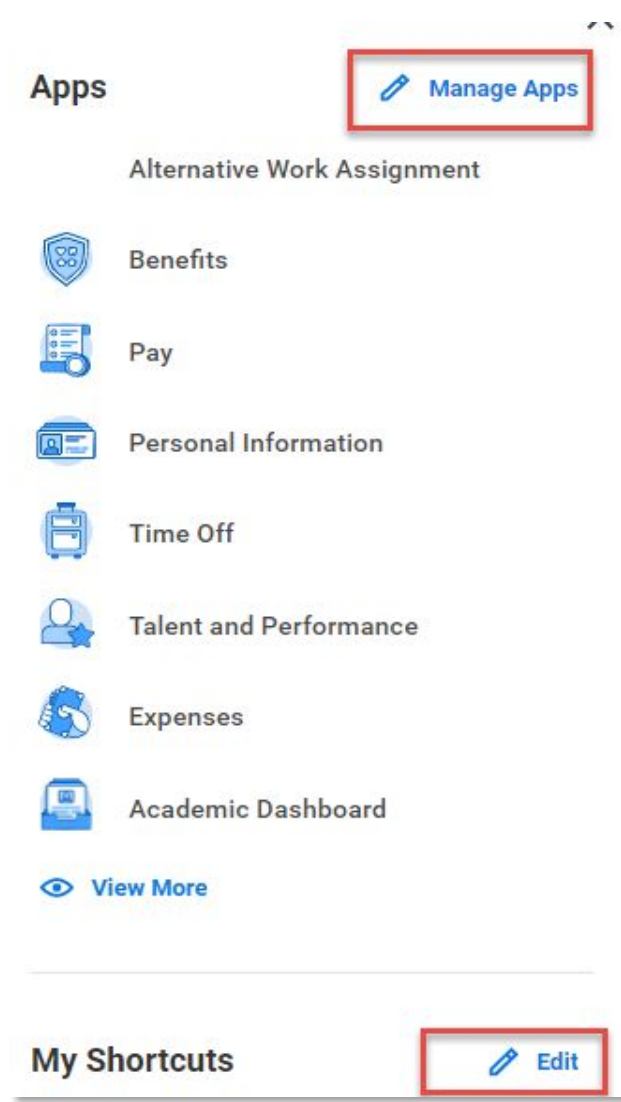
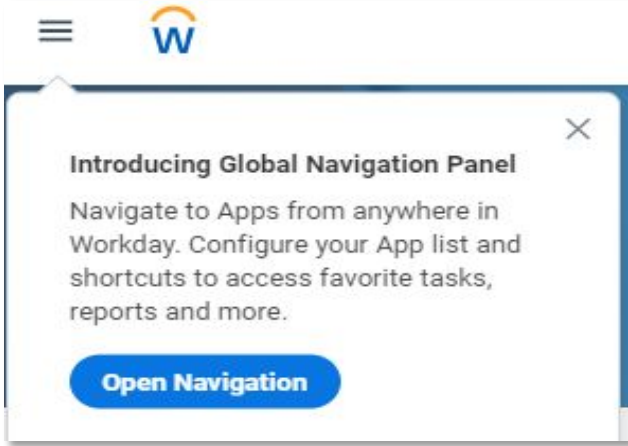
- Use arrows on keyboard from type ahead to select results. Clicking arrow from keyboard will highlight results in type ahead to select; once clicking enter, results will render
- To see more results, enter search criteria and click Enter to expand search beyond type ahead; suggested results will appear
- Tasks supported by Workday Assistant are noted in results

# Search Navigation



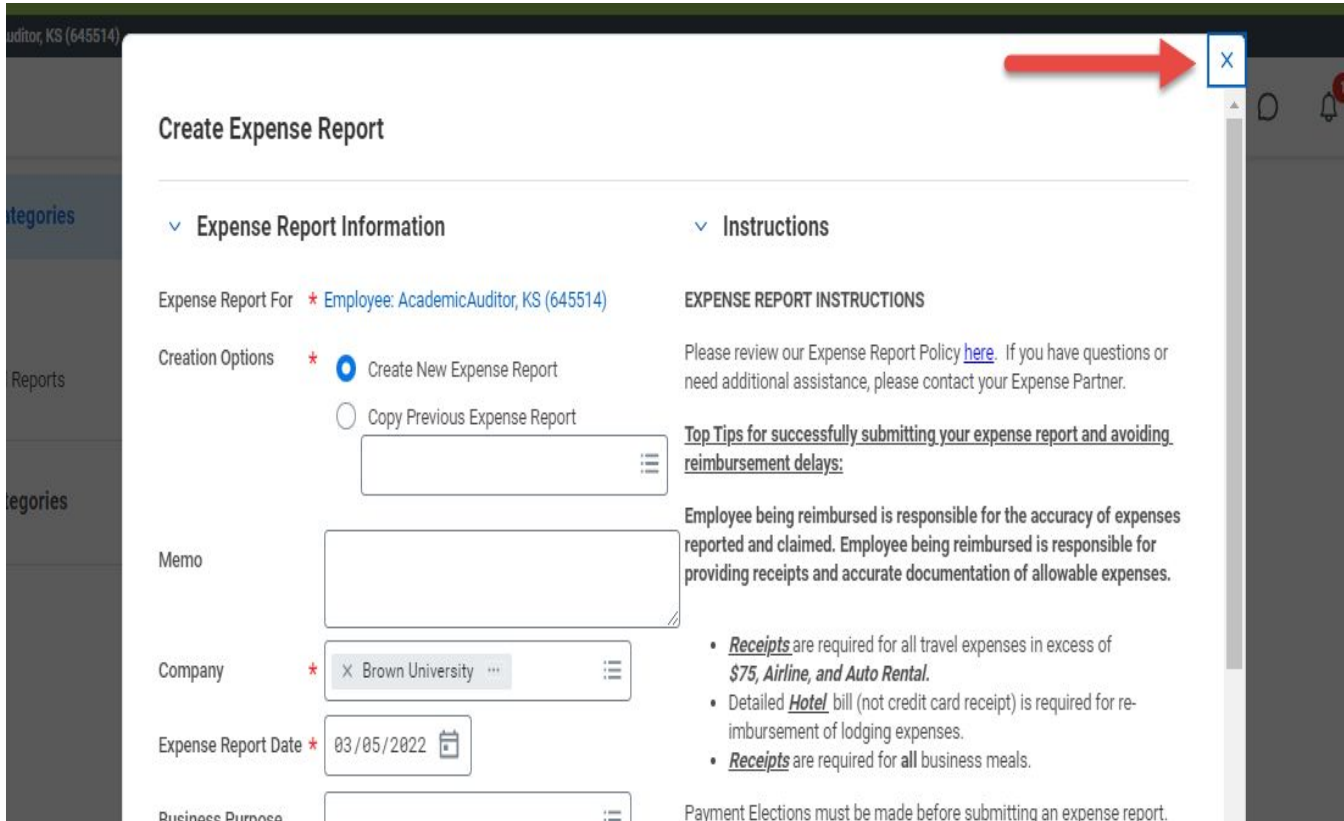
- Ensure search criteria is configured
- Use **More Categories** to expand search
- For more on Search configuration, go [here](#)

# Search Navigation



- Workday reminds you to configure applications as needed via Global Navigation Panel
- You may reorganize your apps to better support your use of Workday by clicking Manage Apps
- Shortcuts are accessible and configurable via global navigation panel

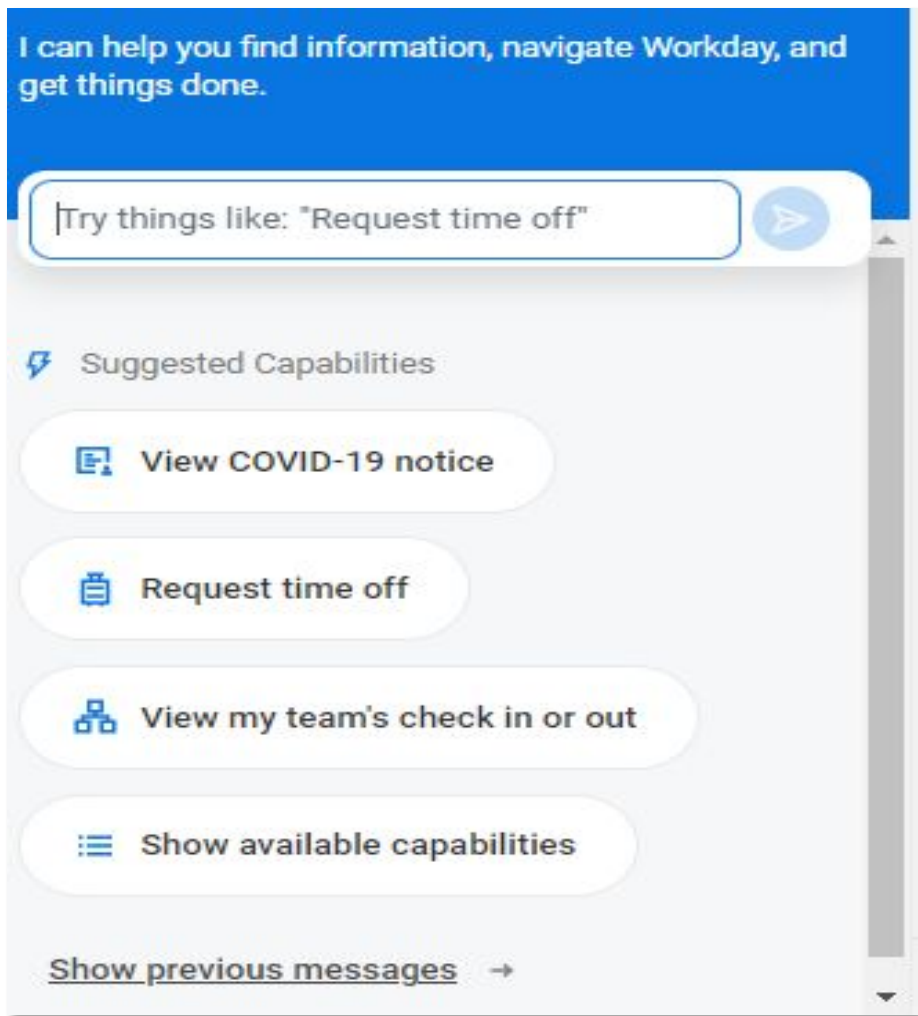
# Accessing Applications



- When accessing tasks in Workday, the task will begin as a pop up on current screen
- You no longer need to use the back button to navigate away from a transaction; click X at top right of screen to close transaction that has been initiated

# Pop Ups for Tasks





- Workday Assistant available tasks highlighted when Assistant is expanded
- Assistant can also display previous inquiries by clicking Show Previous Messages

# Workday Assistant



Workday Assistant 3:29 PM

Time Off Event : Apr 19 - Apr 22: 2 Days  
Vacation Days (Exempt)

What change would you like to make? To correct older or unapproved requests, please use the [Time Off](#) page.

Edit Time Off

Delete Time Off

Cancel

- Workday Assistant can now assist with canceling or editing future time off requests

# Workday Assistant

## Process History

13 items



Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Expense Report Event	Expense Report Event	Step Completed	03/05/2022 02:17:17 PM	03/12/2022	Altomari Cavanagh, Stephanie M (314198)	1	
Expense Report Event	Review Expense Report	Not Required		03/12/2022		0	
Expense Report Event	Review Expense Report	Not Required		03/12/2022		0	
Expense Report Event	Review Expense Report	Not Required		03/12/2022		0	
Expense Report Event	Review Expense Report	Approved	03/05/2022 02:18:28 PM	03/12/2022	Williams, Marie (642770) (Manager)	1	
Expense Report Event	Approval by BMRA Manager	Not Required		03/12/2022		0	
Expense Report Event	Approval by Grants/Contract Accountant	Not Required		03/12/2022		0	
Expense Report Event	Approval by EVP Finance & Administration	Not Required		03/12/2022		0	
Expense Report Event	Review Expense Report	Awaiting Action		03/12/2022	Cruickshank, Steven (645153) (Expense Analyst)	7	
					ExpenseAnalyst, KS (645486) (Expense Analyst)		
					Frazier, Donna L (312763) (Expense Analyst)		
					Gillard, Michael (640679) (Expense Analyst)		
					Pacheco, Luisa M (310177) (Expense Analyst)		

- When reviewing business process history, a new grid framework displays to easily identify the awaiting action, awaiting person(s) and comments
- All awaiting persons can be identified by clicking **All Persons**

# Business Process Grid Display

## Retirement



403(b) Voluntary No ER Match CT  
Waived

Enroll



403(b) Voluntary Roth No ER Match Ct  
Waived

Enroll

- Based on selected change, new user interface displays your options based on eligibility

## Health Care and Accounts



Medical  
Waived

Enroll



Dental  
Waived

Enroll



Vision  
Waived

Enroll



Health Savings Account  
Waived

Enroll

- Click applicable window to begin changes

# Change Benefits User Interface

# Workday 38: Feature Highlights

## *Recruiting and Staffing*

- Name Pronunciation
- Notes on Candidate Profiles and Job Requisitions
- FTE on position restrictions

Change My Name Pronunciation AbsenceAdministrator, KS ...

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Phonetic Pronunciation



- Staff and faculty will have the option to include visual phonetic name pronunciation in Workday, displayed under their name on the worker profile page
- Use the Change My Name Pronunciation task in Workday to update pronunciation

# Name Pronunciation

REQ176419 Workday Analyst (Open) PDF PDF

Recruiting Start Date 02/11/2022 - 22 days ago

Target Hire Date 02/11/2022 - 22 days ago

Primary Location 164 Angell Street

Altomari Cavanagh, Stephanie M (314198)  
Hiring Manager

Notes +

1 item

Altomari Cavanagh, Stepha...  
03/05/2022, 8:08 PM

Requisition updated to include revised grade. Please ensure candidates are aware of the change.

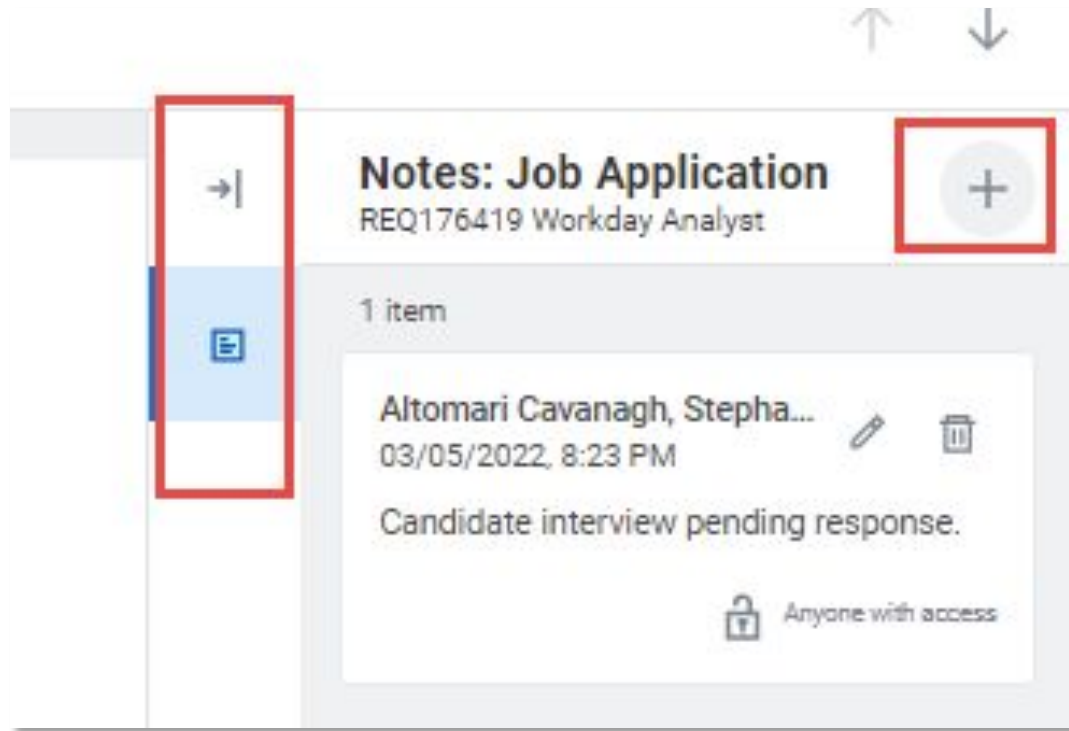
- Updated on 3/1/22

Show Less ^

Anyone with access

- Requisition notes enable those working on requisitions to collaborate and coordinate on status
- Notes are visible to all that have access to requisition internally

# Requisition Notes



- Candidate notes on job applications allow those reviewing applications to communicate and coordinate on status
- Notes are visible to all that have access to requisition internally

# Candidate Notes



Default Weekly Hours	<input type="text" value="37.5"/>
Scheduled Weekly Hours	<input type="text" value="37.5"/>
FTE	100%

- FTE on Create Position allows FTE to be calculated on a position with no active requisition
- This should be used when new positions are created or edited when they are unfilled to update FTE data

# FTE on Position Restrictions

# Workday 38: Feature Highlights

## *Purchasing*

- My Requisitions
- My Requisition Process Interface
- Mass Close/Cancel Receipts

Search for Goods and Services

Find equipment, supplies, and more

### Requisitions

Open (3) Completed (0) [Clear Filters](#) [Edit Filters](#)

<b>REQ-0103558</b> ... Total Amount: \$600.00 1 item	Awaiting Action by <a href="#">Ritchie Hilbert, Madelyn (644978)</a> Created on 03/06/2022	Ordering	Receiving	Invoicing
<b>REQ-0103556</b> ... Total Amount: \$13.57 1 item	Approved Created on 03/03/2022	Ordered	Receiving	Invoicing
<b>REQ-0103508</b> ... Total Amount: \$13,285.91 1 item	Approved Created on 02/16/2022	Ordered	Receiving	Invoicing

### Requisition Details

Edit Requesting for, Ship-to Address, Worktags, and more.

**Requesting for**  
Altomari Cavanagh,  
Stephanie M (314198)

**Company**  
Brown University

[Edit Details](#)

### External Suppliers

Search for goods and services on supplier websites.

[BrownBuys](#)

### Non-Catalog Request

Fill out a form for goods and services.

[Start a Non-Catalog Request](#) →

- **My Requisitions Report** has been changed to easily identify requisitions you have initiated
- This report also supports the initiation of requisitions
- For more information, review the **My Requisitions Report** job aid in Learning

# My Requisitions

## Non-Catalog Request

**What do you need to order?**

Description\*

**What type of order is it?**

Spend Category\*

Is this a goods item or a service?

Goods

Service

**Requisition Details**

Edit Requesting for, Ship-to Address, Worktags, and more.

 **Requesting for**  
Altomari Cavanagh,  
Stephanie M (314198)

 **Company**  
Brown University

[Edit Details](#)

- Requisitions Initiated from My Requisitions will have a streamlined look
- Requisition sections highlight different components of requisition for update and submission

# Requisitions Initiated from My Requisitions

### Mass Cancel Procurement Documents

Request Name \*

Company or Company Hierarchy \*

Procurement Document Type \*

Selection Criteria	Date Selection Criteria
Status for Cancel <input type="text"/>	Inactivity Days <input type="text" value="0"/>
Supplier <input type="text"/>	Last Activity Date On or After <input type="text" value="MM/DD/YYYY"/>
Supplier Contract <input type="text"/>	Last Activity Date On or Before <input type="text" value="MM/DD/YYYY"/>
Purchase Order <input type="text"/>	Document Date On or After <input type="text" value="MM/DD/YYYY"/>
Receipt <input type="text"/>	Document Date On or Before <input type="text" value="MM/DD/YYYY"/>
Zero Quantity/Amount <input type="checkbox"/>	
Spend Category <input type="text"/>	
Exclude Spend Categories <input type="checkbox"/>	
Worktags <input type="text"/>	

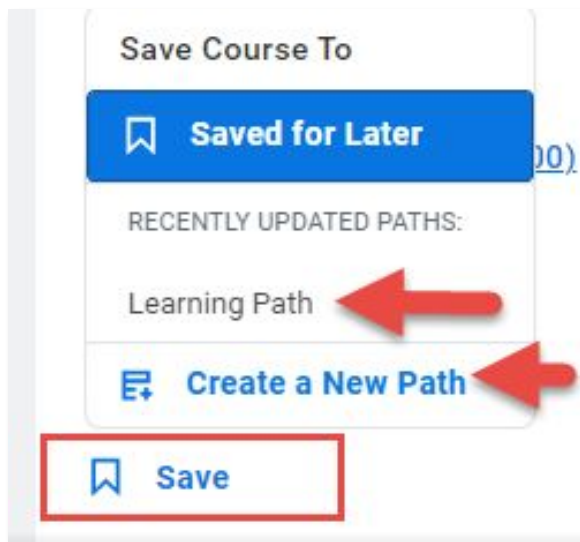
- Used for receipts where PO is still open with unbilled lines
- Used to correct receipt accounting as needed

# Mass Cancel Receipts

# Workday 38: Feature Highlights

## *Learning*

- Sharing Learning Paths
- Announcements in Learning
- Custom sliders
- Retake/Replay courses
- On the Job Training



- Learning Paths are groupings of training content that can be created by saving learning pages
- Once a path is created, it can be shared, edited or updated to be made private to the learner only
- Once **Share Path** is clicked, the link has been copied and can be sent to any other learner



# Sharing Learning Paths

## What will you learn today?

From Your Learning Team



New Content is Available!

New Learning Content has been made available. Please click here for more information.

[Read More](#) →

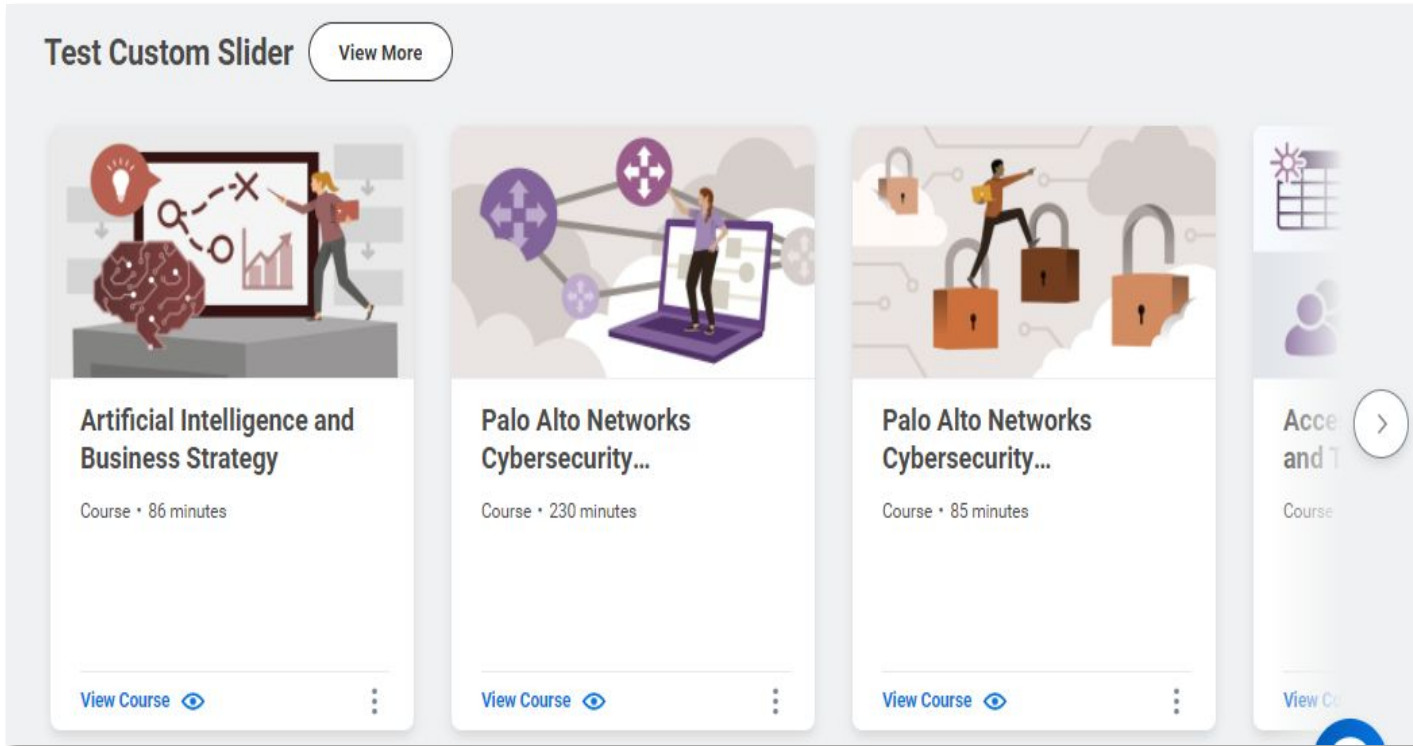


22 days ago

- Announcements specific to learning content will appear on the Workday Learning landing page
- The Talent Development team will use these announcements to communicate information to Brown learners


# Announcements in Learning





- Custom Learning Sliders allow Talent Development to group learning content and display the content in a single panel on the Learner page
- This helps learners access curated content on an ongoing basis

# Custom Sliders

Workd  Program

Retake Course. We recommend you retake this course if you want to improve your results.

**Retake Course**

COMPLETED

Lessons	Delivery Mode
1	Self-Directed

- Retake and Replay is available for course material you have previously completed
- Replay Course is available for media based courses; Retake Course is available for other content

# Retake/Replay Course

The screenshot shows a form for creating a 'Training Activity'. At the top left, a blue box contains the text 'Training Activity' and '1 Required'. Below this, the form fields are as follows:

- Lesson Type:** Training Activity
- Lesson Order:** 1 (with a red asterisk indicating it is required)
- Make Lesson Mandatory:**
- Lesson Title:** (empty text box with a red asterisk)
- Training Materials:** A large dashed rectangular area for uploading materials.
- Track Attendance:**
- Track Grades:**
- Grading Scheme:** Pas (with a red asterisk) and a dropdown menu showing options: Assessment, Demonstration, Observation, and Other.

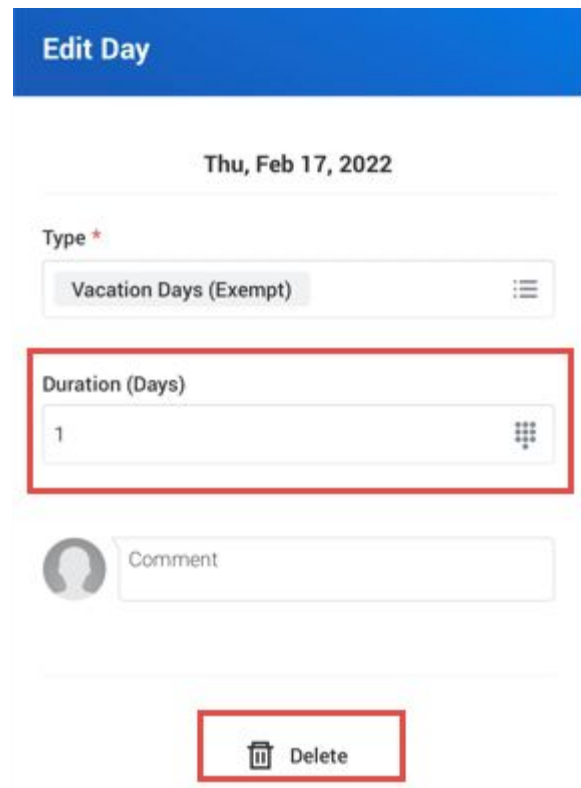
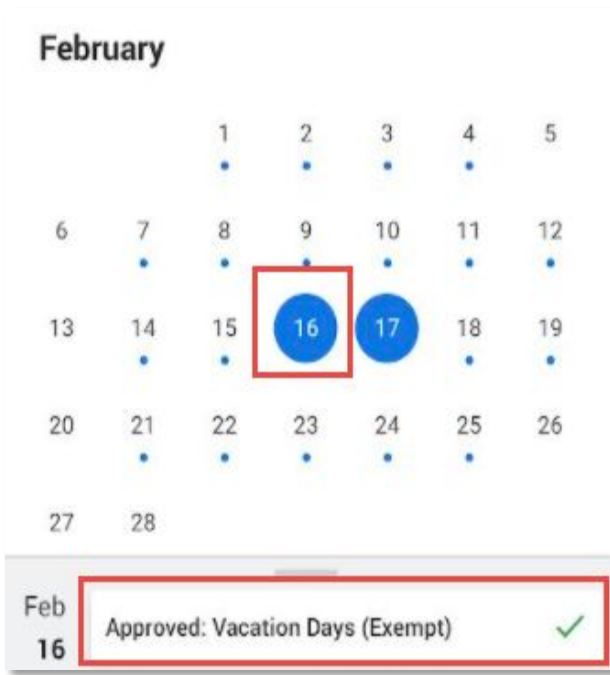
- Supports Training Activities in addition to other content types in Blended Courses
- Activities are tracked in addition to other content to confirm meetings, observations, assessments and other interactions are part of training are documented.

# On the Job Training

# Workday 38: Feature Highlights

## *Mobile*

- Correct time off via Mobile
- Name pronunciation via Mobile
- Scan receipts and create expense reports via Mobile



- Time Off corrections can be done by selecting days that have been submitted
- Once selected, you can edit total hours/days submitted or delete time
- Time will display as being corrected

# Correct Time Off via Mobile

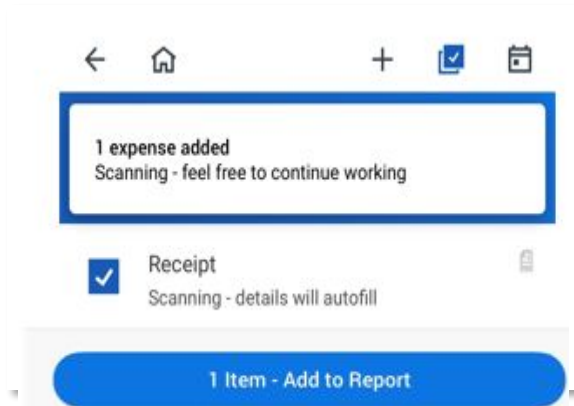
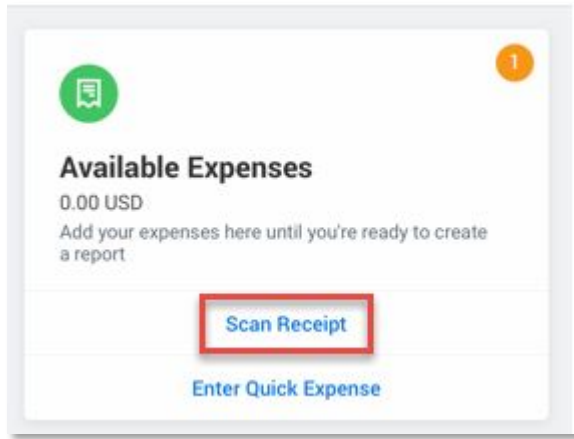
**Change My Name Pronunciation** AbsenceAdministrator, KS ...

Phonetic Pronunciation

- Name pronunciation is available to update in mobile and is viewable on workers profile when using the Workday Mobile app

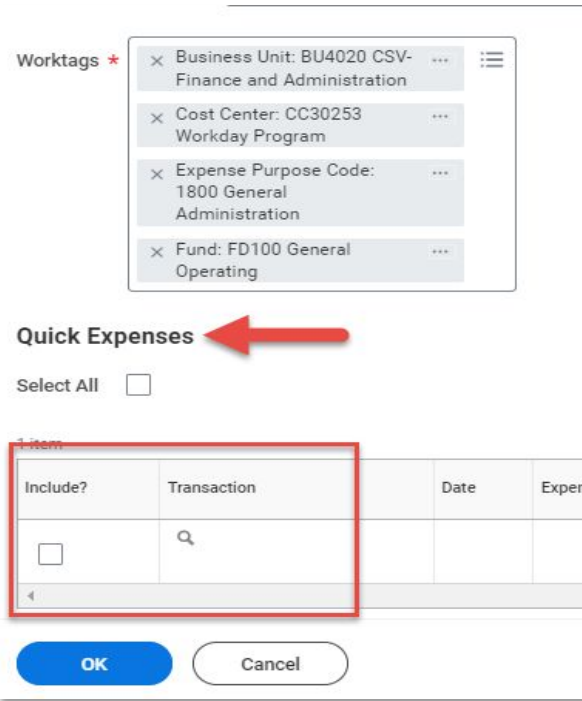


# Name Pronunciation via Mobile



- Receipt scanning directly from Create Expense Report process in mobile application
- Once scanned, select applicable receipts and click Add to Report

# Mobile Expenses



- Complete your expense report on the mobile application or log into Workday from your computer.
- The scanned receipt will be awaiting your action when creating the next expense report in Workday

# Mobile Expenses





- Next release of Workday functionality in September 2022